



**Department of Education
Office of Student Financial Assistance**

Logistics Support

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Executive Summary

Student Aid Front 2 Back is the third in a series of courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the role of other “players” in the financial aid industry (Schools, Lenders, Guarantors), and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements being used by SFA to evaluate and improve how well SFA supports the student financial aid process.

The Accenture team worked closely with SFA University to develop the logistical requirements for the Front 2 Back course. Specifically, Accenture developed and supported the execution of a detailed logistics work plan. This included: coaching the SFAU logistics staff on clarifying roles; determining the number and location of Front 2 Back training sessions; obtaining bids from event planning firms; selecting, scheduling, and training of Logistics Coordinators/Hosts; procurement of training materials; and the return of reusable items from the regional training locations.

This document includes:

- Work Plan
- Role Clarification
- Planning Documentation: Training Sites
- Event Planning Firms
- Logistics Coordinator/Host Selection, Scheduling, and Training Support Materials
- Process for Return of Training Materials

Documents described in this executive summary are attached as appendices.



Work Plan

The need to create a detailed work plan was essential to the success of the logistical effort supporting Student Aid Front 2 Back. Initially, the work plan reflected each of the major components of the project. The logistics section of the overall project work plan was then expanded to include every logistics detail required to ensure the success of the class.

The work plan was created in an Excel Spreadsheet, which allowed it to be updated and manipulated whenever necessary. The vertical axis of the sheet, listed the required tasks. A calendar was then laid out along the horizontal axis. Each task had a corresponding box shaded to indicate the date by which it must be completed. The final step was to assign each one of the tasks to a specific person. Representing this work plan visually demonstrates how each item relates to the others. For example, if one deadline is missed, the work plan clearly demonstrates the adverse effects on each item that follows it.

A work plan will ideally:

- Keep the project on schedule
- Identify milestones
- Help plan for contingencies as they arise

The detailed Project Work Plan is included as Appendix A.



Role Clarification

An important first step in the logistics process for the Student Aid Front 2 Back course was to clarify roles, which meant determining who was responsible for which tasks. This establishes a common understanding of individual stakeholders' responsibilities and prevents confusion over the course of the project.

Based on the assumptions for Student Aid Front 2 Back, role descriptions were determined and discussed during planning sessions. Once these were agreed upon, specific individuals or groups were assigned as process owners for each logistics task.

Clarifying roles early on encourages:

- Thorough planning
- Strong leadership
- Increased accountability

An Initial Role Determination Grid is included as Appendix B.



Planning Documentation: Training Sites

Three pieces of information were used to determine the number of Student Aid Front 2 Back course sessions that would be held:

- The number of SFA employees in each office
- The maximum and minimum number of participants needed to conduct a class
- The number of Operating Partner employees that would attend Washington, DC - based classes

Initial data was developed indicating how many SFA employees were in each regional location and in Washington, DC. By comparing this data to the maximum number of participants for one class, the number of regional classes to be offered was determined.

Via the Operating Partners Training Working Group, SFAU presented Greg Woods' vision of having Operating Partner and SFA staff attend this training class side by side whenever possible. With this goal in mind, each Operating Partner determined the number of employees that would attend the Student Aid Front 2 Back course in Washington, DC. This commitment on the part of Operating Partners, combined with the number of SFA employees, was used to determine the number of sessions that would be offered in Washington, DC.

In the end, the final distribution was based on a total of 1900 participants with a maximum of 30 individuals per course session. The results were:

- Regional Courses: 23
 - Boston: 1
 - New York: 2
 - Philadelphia: 2
 - Atlanta: 4
 - Chicago: 4
 - Kansas City: 2
 - Dallas: 2
 - Denver: 1
 - San Francisco: 4
 - Seattle: 1
- Washington, DC: 40

Regional Site Location and Number of Session documents are attached as Appendix C.



Event Planning Firms

Based on the overall cost of previous training courses, it was determined that pursuing alternative classroom venues would achieve significant cost reductions. Historically, training programs in both regional locations and Washington, DC have been conducted in hotels. Based on this, it was suggested that non-hotel space could be reserved in regional locations at a lower cost, while still offering the same professional atmosphere that SFA University demanded. At the same time, SFA University committed to construct a training area on the Garden Level of the Portals building, so that hotel space would not be needed in Washington, DC. Event planning firms were enlisted to help facilitate the search for non-hotel space in the regional locations.

Due to time constraints, instead of initiating a formal “request for proposal” from event planning firms, Accenture developed a set of discussion points and questions to be used when contacting firms over the telephone. These points covered:

- A set of initial assumptions
- Specific questions required of any firm that wished to submit a bid
- Information on registration system capabilities that they could provide
- A description of their role on the day of the training sessions

These discussion points ultimately established the logistical requirements for the Student Aid Front 2 Back class.

Three different event planning firms were then contacted via telephone: Accommodations Unlimited, Meeting Management Services, and Conference Direct. Accenture held discussions with each firm and requested they submit a proposal electronically within 48 hours. The firms were also informed of Accenture’s timeframe; the team would make a decision within one week of receiving all three proposals.

The proposals were evaluated based on price, willingness to be flexible to meet SFA University’s needs, and ability to provide the exact mix of services that were discussed in our telephone conversations. Based on these criteria, Conference Direct was selected as the event planning firm to help SFA University with the regional locations. This recommendation was submitted to Vicki Wilson in the next Process Owners status meeting.

Due to circumstances surrounding SFA University funding (budget freeze) and the need to move forward immediately, SFA University selected another option. An existing funded contract allowed SFA University to move forward with necessary logistics arrangements without delay. The enclosed event planning firm research is included to benefit future projects.

The Event Planning Parameters and Proposals are attached as Appendix D.



Logistics Coordinator/Host Selection, Scheduling, and Training Support Materials

Based on the successful Presenter Selection Process, the Logistics Coordinator/Host selection process was developed to recruit highly motivated individuals to support the Student Aid Front 2 Back course. Accenture worked with Vicki Wilson, Scarlett Brock, and Anita Gross to craft the selection process. Vicki Wilson was the Process Owner.

The first step was to develop an application and determine how this would be communicated to both SFA staff and Operating Partners. A communications schedule was developed to:

- Raise general awareness about the positions and the selection process
- Roll-out the application
- Contact applicants regarding their status once the selection process was complete

Anita Gross then managed the communications process and directed the creation and distribution of messages.

Once the application deadline had passed, Vicki Wilson established a committee tasked with selecting the Logistics Coordinators and Hosts for the course. This committee reviewed all of the applications that had been received. Once the applications had been reviewed and discussed, the Logistics Coordinators and Hosts were selected. After these decisions were made, the committee:

- Developed a Logistics Coordinator schedule
- Contacted applicants that had been selected
- Contacted applicants that had not been selected
- Addressed regional locations where no one had applied

The selection committee reviewed the scheduling process used by the presenter selection team and decided to schedule Logistics Coordinators differently. Rather than request that Logistics Coordinators submit information on when they were available, they assigned everyone up front and made adjustments only if conflicts arose. The team felt that this would reduce confusion and allow enough time for Logistics Coordinators to adjust their schedules to avoid significant rescheduling requests.

The process owner decided to contact everyone via e-mail. This message would contain the selection committee's results, and offer congratulations or consolation. If an individual had been selected, the e-mail contained the dates and locations of the courses to which they were assigned as a Logistics Coordinator or Host. If relevant, this message would also contain information on travel and training for Logistics Coordinators being held May 9 – 11 in Washington, DC. Only four applicants were not selected to participate as either a Logistics Coordinator or Logistics Host.



Student Aid Front 2 Back: Logistics Support

Finally, the team addressed the issue of finding a Logistics Host for the four regional locations where no one applied. To handle this situation, the group contacted the individual selected as the Logistics Coordinator and requested a recommendation for someone from their office who might want to participate as a Logistics Host. These individuals were then contacted and, if appropriate, selected as Logistics Hosts for that regional location.

Accenture helped develop the Logistics Coordinator portion of the Training Of Trainers (TOT) held in Washington, DC from May 9 – 11. Materials developed for the Logistics Coordinator training included:

- An agenda
- An emergency contact flier
- A minute-by-minute breakdown of Logistics Coordinator duties during the course

This timeline covered everything that the Logistics Coordinator was responsible for from set-up to wrap-up. Each one of these training materials became a part of the Logistics Coordinator Training Binder created for use in the class.

The Logistics Coordinator/Host Training Support Materials are attached as Appendix E.



Process for Return of Training Materials

When the decision was made to obtain “reusable” training materials, it became necessary to establish a procedure for returning them to SFA University upon the course’s completion. These materials would then be available for use during future training classes.

A new checklist was created, based on the initial shipping checklist, to reflect those items to be returned to SFA University. Through the use of this checklist, an element of inventory control was added to increase accountability. The Return Item Checklist requires that each Logistics Host note the following:

- Total number of items received
- Total number of items returned
- Date shipped
- Expected arrival date
- Tracking number

A set of instructions accompanied the checklist. This document details a step-by-step process for the Logistics Host to follow while packaging and returning the necessary training materials. Once both were completed, they were sent to each Logistics Host via e-mail. Contact information was provided in case the Logistics Host had any questions about how to complete this procedure.

The Return Items Procedure is attached as Appendix F.



Appendix A:

Work Plan



Appendix B:

Initial Role Determination Grid



Appendix C:

Regional Site Location and Number of Sessions



Appendix D:

Event Planning Parameters and Proposals



Appendix E:

Logistics Coordinator/Host Training Support Materials



Appendix F:

Return Items Procedure